State of Michigan

Records Management Services

eSignature Solution
Tip Sheet: Delegated Signing Authority

Delegation is a setting in the eSignature portal that allows a user to provide access to their account to another person (a.k.a. “delegate”). The delegate will be able to access the other person’s transactions so they can create, view, and sign transactions that are in progress.

Delegation is intended for two purposes:

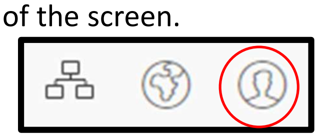
1. It allows someone who is not in the office to have their eSignature transactions monitored by someone in the office to ensure documents are signed promptly, if they are time sensitive.
2. If someone issues a written notice of delegated authority to another person, they allow that person to sign documents on their behalf. This setting grants people the ability to implement that authority with eSignature transactions. When this is done, the signature block will say “sender b signed on behalf of sender a” to indicate the document was signed using delegation.

Delegation should only be used with the approval of the business unit manager, to ensure all business processes are followed and only approved staff are provided delegated access to mailboxes. Note: If an employee cannot access the eSignature portal and needs to enable the delegation permissions, they should contact their office’s Local Coordinator, who can put in a ticket to the help desk for assistance.

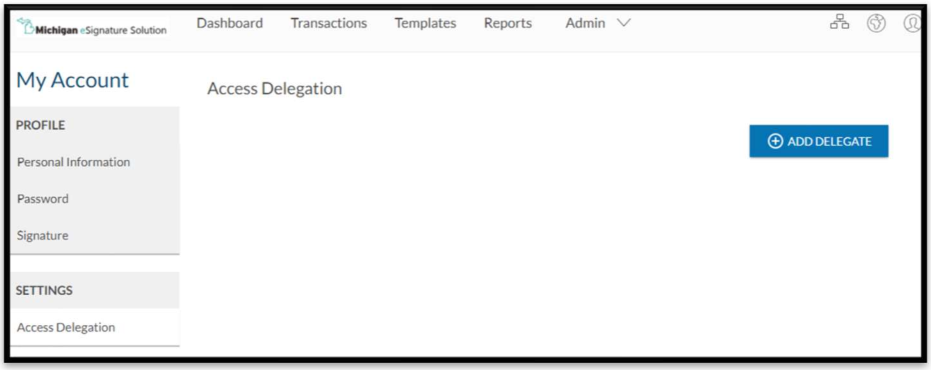
Turning On Delegation

1. To delegate signing for your own account, first change your sub-account to the “State of Michigan” sub-account by clicking on the org chart button on the top right of the screen and then selecting State of Michigan.

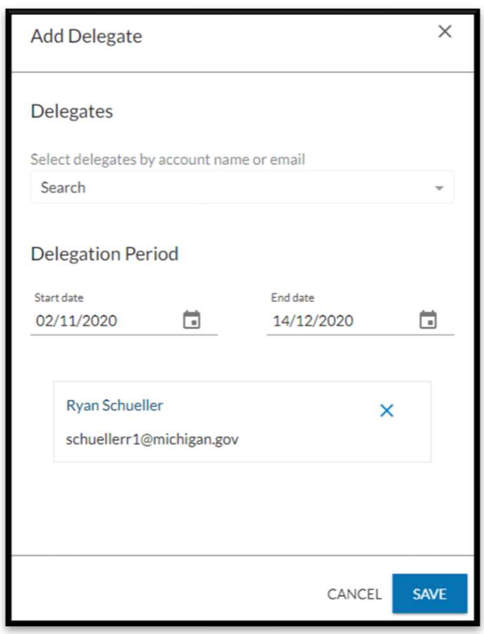
2. Click the head icon on top right of the screen.



3. Choose My Account from the menu. Under the Settings tab on the left, select Access Delegation. Click Add Delegate.



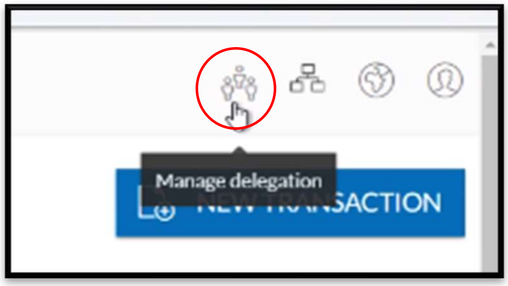
4. In the search field, begin typing the delegate's email address. Then click on their information. Next, choose the timeframe that you would like them to be able to sign on your behalf, or it can be allowed until you choose to manually disable the delegated access. **Note: The date format will read as "DD/MM/YYYY."** Click the Save button.



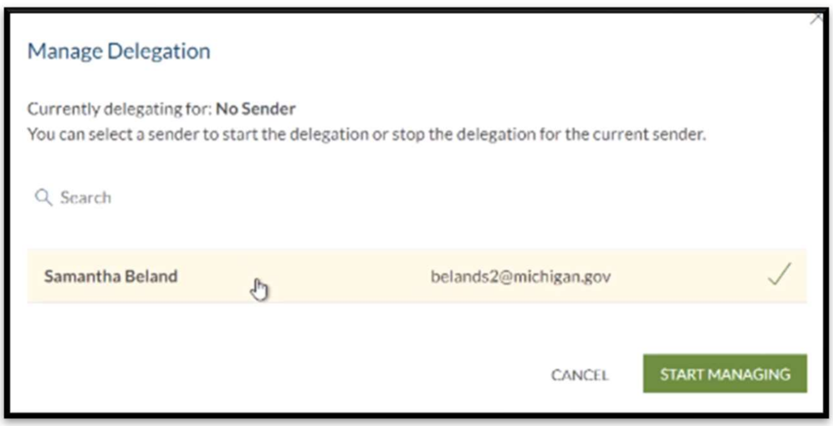
5. The delegate will receive an email.

Managing Delegation of Someone Else's Account

1. The delegate can manage the delegation by clicking the link in the email, or by signing into the eSignature portal and hovering over the Manage Delegation icon (see screenshot below). The delegate needs to first open the "State of Michigan" sub-account (see step #1 of Turning on Delegation).

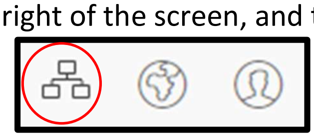


2. The delegate can click on the delegator’s name, and then click on the Start Managing button.



3. In the upper right-hand corner, there will be an indicator that the delegate is now managing transactions on the behalf of the delegator.

4. The delegate needs to go to the sub-account where the transactions are located. Click on the org chart button on the top right of the screen, and then select the correct sub-account.



5. On the dashboard, the delegate can view all transactions for the delegator. Click on a transaction that needs to be signed, and sign the document(s). The delegator’s name will still appear on the signed document(s). A disclaimer will also appear stating that the document was e-signed by the delegate on behalf of the delegator.

E-SIGNED by Ryan Schueller on behalf of Samantha Boland on 2020-12-10 09:46:41 EST

6. If the delegate needs to sign their own documents, they can stop managing delegation for the delegator. Return to the State of Michigan sub-account. Click the Manage Transactions for [delegator name] link in the upper right-hand corner. Then click the delegator's name, and select the Stop Managing button. The delegate can then return to their own sub-account.